HiPath Manager PCM

Version 2.0

User Manual

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1 Introduction

HiPath Manager PCM 2.0 (**P**ersonal **C**all **M**anager) is a browser-based application for configuring and administering call forwarding features. Personal settings can be accessed via a local network PC system or remotely via the intranet/Internet.

The call handling PCM functionality should not be confused with conventional call forwarding or call destination lists. PCM features a user-specific, standalone forwarding function based on its very own connection strategy. PCM is used to improve and speed up personal availability during office hours, working hours and periods of absence.

Administrative PCM parameters and PCM users are configured using a separate configuration tool within the MS Management Console. You will find information on how to configure the program in the Administrator Manual.

HiPath Manager PCM Web is optimized for use in conjunction with Internet Explorer (V4.01 SP2 or higher). Deviations in terms of display and functionality may occur in other script-based browsers on account of browser-specific behavior. We therefore only recommend the use of Internet Explorer.

1.1 What's new in this version

The following modifications and enhancements vis-à-vis the previous version (V1.0) were incorporated in HiPath Manager PCM 2.0:

- The user interface was revised (myPersonalWebManager)
- The language can be selected when logging on to the web
- Predefined homepages can be selected in PCM
- The menu structure and display were enhanced
- Shortcuts were introduced as an alternative means of selecting functions
- A PCM function page can be individually selected as the login page
- Forwarding destination lists and caller lists (each for an unlimited number of entries) were introduced
- Standard and special call handling types (number unlimited) were configured
- Call handling types can be activated simultaneously for both standard and special callers
- Call handling types for standard and special callers can be activated via configured terminal keys
- Active call monitoring
- Caller lists with status administration were integrated
- A call functionality based on direct dialing, via the LDAP telephone directory or via caller lists was integrated
- The individual options were enhanced

1.2 This manual...

is designed for HiPath Manager PCM 2.0 users as well as system administrators. With the help of this manual, all users should be able to use HiPath Manager PCM 2.0 and its functions. The user should have a basic command of the Windows user interface.

1.2.1 Terminology conventions

As an aide to the reader, the product name "**HiPath Manager PCM 2.0**" has been abbreviated in this documentation to "**PCM**".

The name of the PCM interface is "**myPersonalWebManager**".

1.2.2 Document conventions

The following conventions were adopted in these operating instructions to provide a clearer distinction between the different types of information.

1. The individual steps for operating instructions are numbered.

- Bullets are used to indicate lists of items.

Names of operating elements such as keys and mask titles are printed in bold, for example, **Login Options**.

This symbol is used to indicate information to which you should pay particular attention or that simplifies program operation.

This symbol is used to signal high priority information. This information must be observed to avoid damaging the system or losing data.

1.3 Overview of mouse key functions

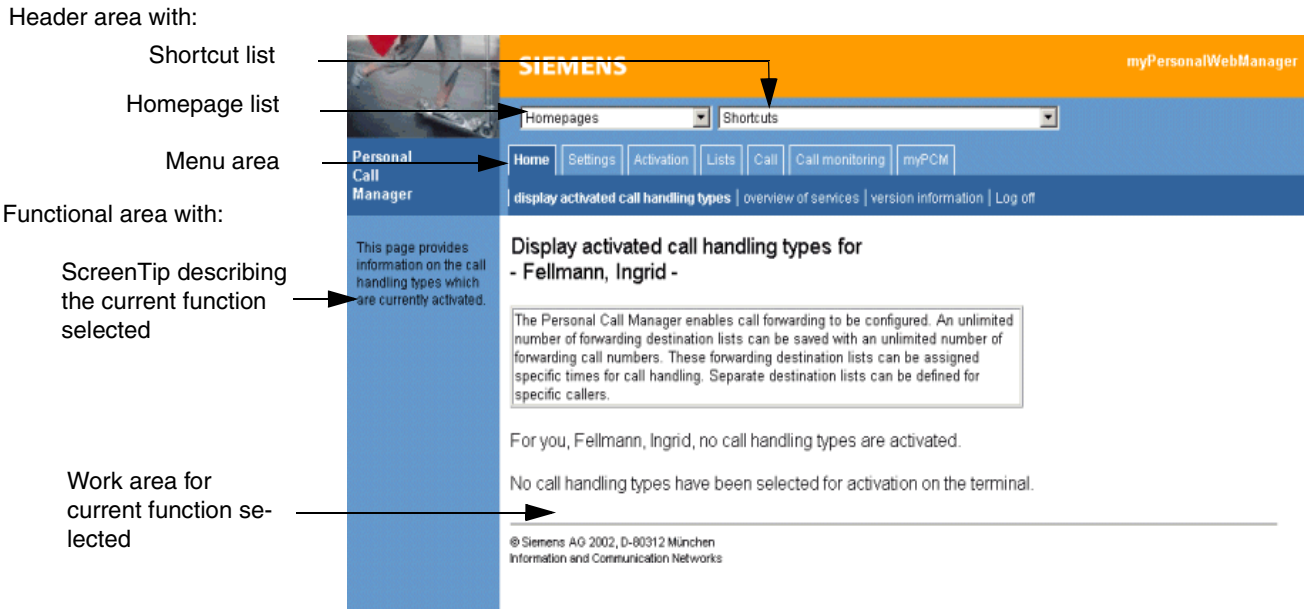
Terms	Explanation
Click	Press the left or right mouse button briefly
Double-click	Briefly press the left mouse button twice in quick succession
Drag	Click on an object or area and hold the left mouse button down
Drag&Drop	Click on an object or area, hold the left mouse button down, and move the object to the required area. Then release the mouse button.

The TAB ⇆ and RETURN ↵ keys can be used to enter data.

2 Personal Call Manager

2.1 myPersonalWebManager

The PCM user interface, known as **myPersonalWebManager**, appears after login with the following elements:


Header area with:
Shortcut list
Homepage list
Menu area
Functional area with:
ScreenTip describing the current function selected
Work area for current function selected
SIEMENS
myPersonalWebManager
Homepages
Shortcuts
Personal Call Manager
Home
Settings
Activation
Lists
Call
Call monitoring
myPCM
display activated call handling types
overview of services
version information
Log off
This page provides information on the call handling types which are currently activated.
Display activated call handling types for
- Fellmann, Ingrid -
The Personal Call Manager enables call forwarding to be configured. An unlimited number of forwarding destination lists can be saved with an unlimited number of forwarding call numbers. These forwarding destination lists can be assigned specific times for call handling. Separate destination lists can be defined for specific callers.
For you, Fellmann, Ingrid, no call handling types are activated.
No call handling types have been selected for activation on the terminal.
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Element	Description
Header area	The homepage and shortcut lists in the header area activate when the user logs on. All functions in the menu area are available for selection. Prior to user login, the only item available for selection in the header area is the list of homepages.
Shortcut list	Instead of working your way through a series of (sub)menu items to perform a function, you can select the function you want directly by choosing the associated shortcut from this list.
Homepage list	You can jump to one of the pages listed here. The pages available are defined by the system administrator.
Menu area	The menu area contains all selectable functions arranged into main menus (upper line) and submenus (lower line). The function/menu item currently selected is displayed in bold and on a dark background in the main menu and submenu.
Functional area with the ScreenTip and work area	The functional area provides a ScreenTip on the left with additional information on the current function selected and a space - the work area - for executing this function.

2.2 General functions

This section contains information on the following topics:

- Starting and logging on
- Overview of functions
- Selecting homepages
- Shortcuts
- Logging off and exiting

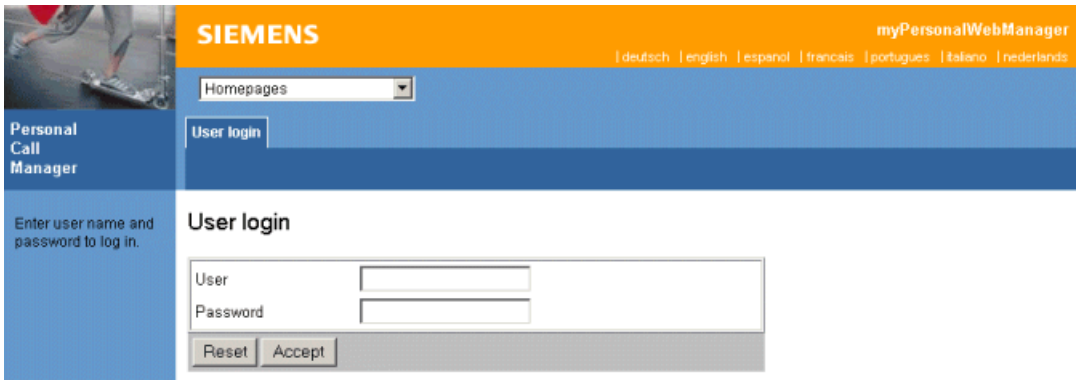
2.2.1 Starting and logging on

Normally, the PCM's login screen should be configured in your browser as the default page, that is, as soon as the browser is opened, **myPersonalWebManager** should automatically appear with the **User login** page. If this page is not configured, then start the PCM as described below. Ask your system administrator for the appropriate URL. To log on to the system, you will be required to enter a user name and password. This security mechanism is designed to prevent unauthorized access to personal data. Your user name and password should be assigned by your system administrator.

Activating PCM

1. Enter the URL in the address box using the following syntax:
   "http://(server name)/managerpcm"

   myPersonalWebManager starts, and the **User login** page appears.



Language selection

Before logging on, you can select the language of the PCM user interface by clicking the appropriate language in the header area of the **User login** window. The following languages are available:

- German
- English
- Spanish
- French
- Portuguese
- Italian
- Dutch

When you start PCM, myPersonalWebManager opens in the languages last activated. The language last selected is flagged in a cookie for Internet Explorer. For this to work, "Accept All Cookies" must be activated in the Internet Explorer settings. More information on this can be found in the Windows Help.

Logging on to PCM

1. Enter your user name and password in the **User login** mask.

   The **Reset** function allows you to clear the screen of any existing entries so that you can make your own.

2. Click **Accept** or press ↵ .

   The PCM page defined as the user's login page appears.

2.2.2 Overview of functions

The following functions are available after user login:

Menu	Function	Description
Home	Display activated call handling types	Displays the call handling types activated for the user logged on as well as the call handling types activated for the terminal.
	Overview of services	Provides an overview of the active status of services.
	Version information	Displays the PCM version installed.
	Log off	Logs the user off.
Settings	Forwarding destination lists	Configures the forwarding destination lists.
	Caller lists	Configures the caller lists.
	Standard call handling	Configures call handling for standard callers.
	Special call handling	Configures call handling for special callers.
	Log off	Logs the user off.
Activation	Activate call handling types	Activates/deactivates call handling types and assigns default call handling types to standard and special callers.
	Log off	Logs the user off.
Lists	All calls	Lists all callers.
	Switched calls	Lists switched callers.
	Non-switched calls	Lists non-switched callers.
	Log off	Logs the user off.
Call	Direct dialing	Dials a subscriber directly.
	Dialing from the telephone directory	Searches for a subscriber and call him/her directly from the telephone directory.
	Dialing from the caller list	Calls a subscriber directly from the caller list
	Log off	Logs the user off.
Call monitoring	Automatic signaling	Performs call monitoring at the terminal and automatic signaling (for direct answering or forwarding).
	Log off	Logs the user off.

Menu	Function	Description
myPCM	My settings	Configures user-specific PCM settings, e.g. PCM login page, activation keys at the terminal, etc.
	Forwarding options	Configures general forwarding options.
	Change password	Modifies the user password.
	Log off	Logs the user off.

2.2.3 Selecting homepages

The system administrator can use the HiPath Manager PCM administration program to define system-wide URL addresses (homepages) that can be opened in the PCM by PCM users. The list of homepages defined is always available in the **Homepages** list box in myPersonalWebManager, irrespective of the function currently in use (see Administrator Manual).

2.2.4 Shortcuts

The individual PCM functions can be selected via the hierarchical menu structure. As an alternative to this method of selection, the **Shortcuts** box contains a list of all functions. Here, you can select the function you want directly. The Shortcuts list box is always available (in every function) in myPersonalWebManager after user login.

2.2.5 Logging off and exiting

Logging off a user

To log the current user off, select the **Log off** function which is the last function available in every menu. The PCM **User login** mask reappears after you log off. To log back on to the system, proceed as described in section 2.2.1, "Starting and logging on".

Exiting PCM

To exit PCM, close the myPersonalWebManager browser window.

2.3 Managing call forwarding

Call forwarding is configured in PCM in the following steps:

1. Configuration of forwarding destination lists

This involves first of all defining the forwarding destinations to which calls are to be forwarded.

– To provide different types of situation-specific forwarding destinations, the individual forwarding destinations are arranged in forwarding destination lists.

– A forwarding destination list can contain a random selection of external and/or internal call numbers.

– The number of call numbers in a forwarding destination list and the number of actual forwarding destination lists are not limited.

For more information on configuration, see section 3.2.1, "Forwarding destination lists".

2. Configuration of caller lists

A special forwarding handling type can be created in PCM for "special" callers.

– These callers can also be grouped in situation-specific caller lists (e.g. based on projects or customers).

– A caller list can contain a random selection of external and/or internal caller numbers.

– The number of caller numbers in a caller list and the number of actual caller lists are not limited.

For more information on configuration, see section 3.2.2, "Caller lists".

3. Configuration of caller handling types

When configuring caller handling types, the requested forwarding destinations (forwarding destination lists) are assigned to call handling types. PCM can distinguish between standard and special call handling:

– **Standard call handling** defines the dates and/or times at which call forwarding is activated.

– **Special call handling** also allows you to specify the callers who require this "special" treatment by assigning caller lists.

For more information on call handling, see section 3.2.3, "Standard/special call handling".

4. **Activation of call forwarding**

   This step involves activating the call forwarding action configured, so that incoming calls are forwarded in accordance with your settings. Activation can alternatively be performed in PCM via a configured terminal key.

   For more information on the activation of call forwarding, see section 3.3.1, "Activate call handling types".

Individual user settings

Every user can make general individual settings. These settings include

- general settings
  e.g. for call and pause times, texts, terminal keys, etc.
- forwarding settings
  information on forwarding to redirected or forwarded stations, voicemail or "special" call numbers.

Making calls with PCM

You can use PCM to

- set up calls by dialing the call number directly.
- set up calls by dialing from the telephone directory.
- set up calls to callers via the caller list.

For more information on making calls with PCM, see section 3.5, "Call".

Call monitoring

Instead of activating the call handling type configured, you can start call monitoring. In this case, all incoming calls are displayed in PCM with the information available (call number, name, etc.) and you can accept the call or forward it to configured forwarding destinations. Call monitoring can only be activated after user login at **myPersonalWebManager**.

3 PCM Functions

This chapter provides an overview of the individual PCM functions in their sequence of appearance in the menu. The functions of the following menu items are described:

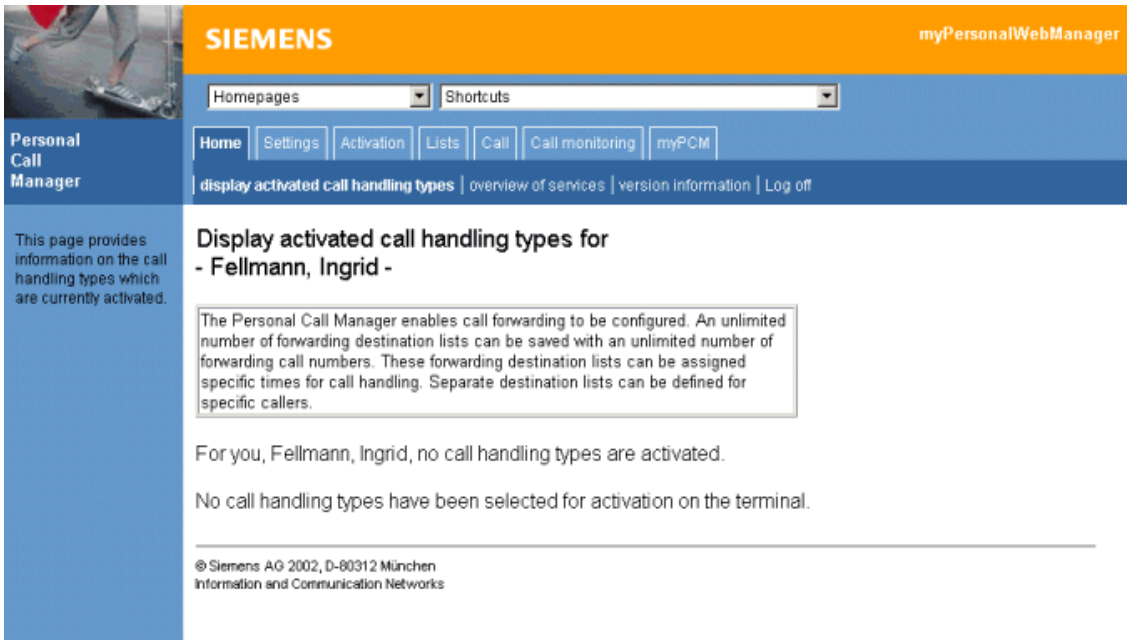
- Home
- Settings
- Activation
- Lists
- Call
- Call monitoring
- myPCM

3.1 Home

3.1.1 Display activated call handling types

Select **Home - display activated call handling types** to display the call handling types activated for the current user.

Display


SIEMENS
myPersonalWebManager
Homepages
Shortcuts
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Home
Settings
Activation
Lists
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Call monitoring
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display activated call handling types
overview of services
version information
Log off
This page provides information on the call handling types which are currently activated.
Display activated call handling types for
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The Personal Call Manager enables call forwarding to be configured. An unlimited number of forwarding destination lists can be saved with an unlimited number of forwarding call numbers. These forwarding destination lists can be assigned specific times for call handling. Separate destination lists can be defined for specific callers.
For you, Fellmann, Ingrid, no call handling types are activated.
No call handling types have been selected for activation on the terminal.
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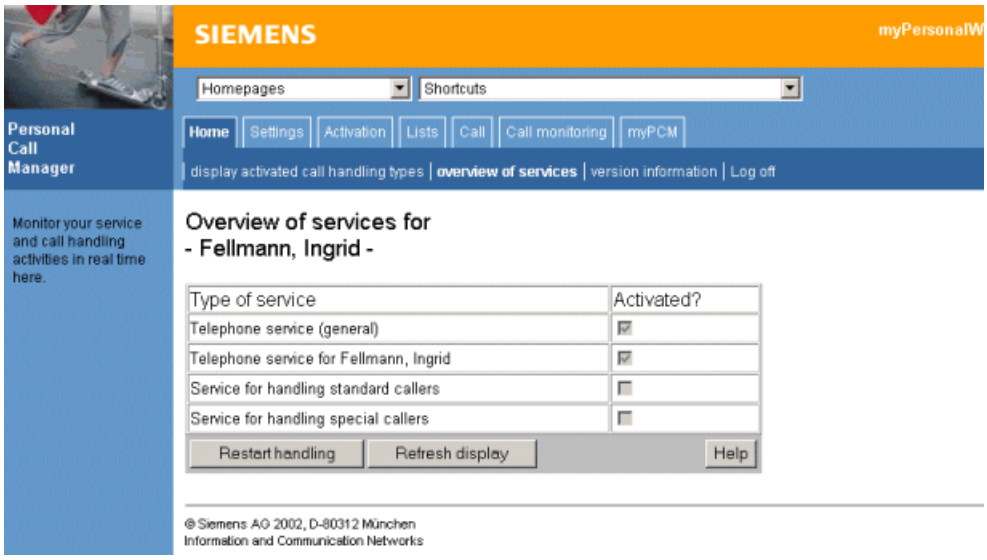
3.1.2 Overview of services

You can check which services are actually active on the server under **Home - overview of services**.

Display



- The general phone service must be permanently active to facilitate call forwarding.
- The phone service must also be active for every user who has activated call handling.
- The remaining services depend on the handling types activated.

The **Restart handling** switch allows you to restart the handling activities.

The **Refresh display** switch allows you to repeat the service check.

3.1.3 Version information

Select **Home - version information** to display the current number of the PCM version installed.

3.2 Settings

The following functions can be selected in the **Settings** menu:

- Forwarding destination lists
- Caller lists
- Standard/special call handling

3.2.1 Forwarding destination lists

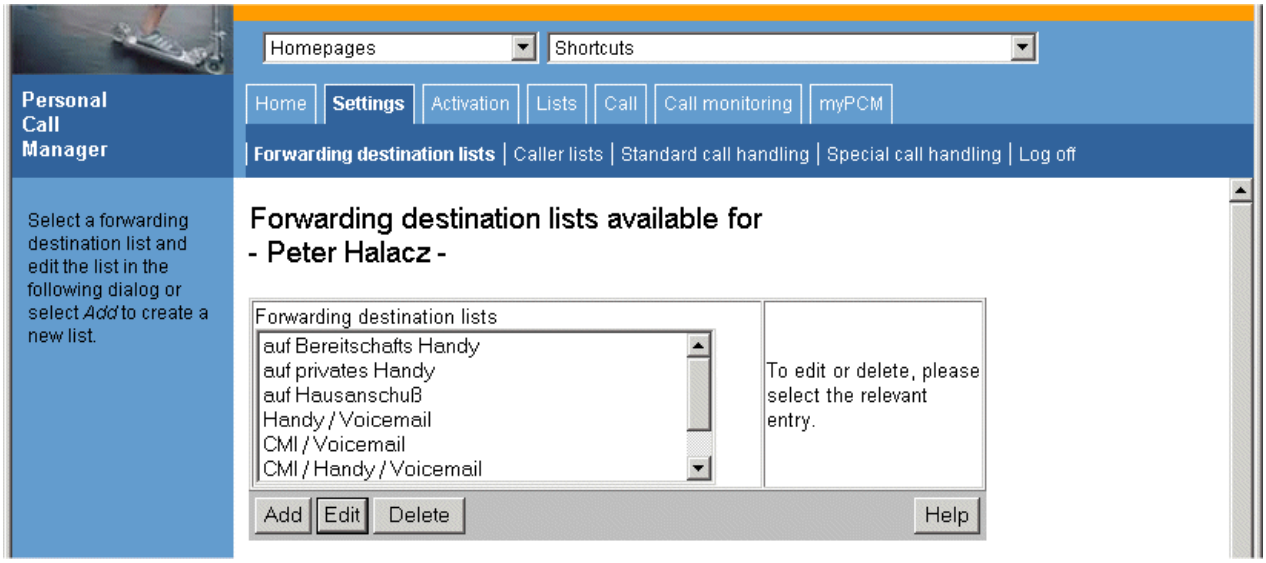
The number of call forwarding numbers specified is unlimited when defining call handling types. Depending on the current situation, different call forwarding numbers may be useful or necessary for a call handling type. Destination call numbers are consequently grouped into forwarding destination lists which are then assigned to the relevant call handling types during definition.

- A forwarding destination list can contain an unlimited number of forwarding call numbers.
- The call number sequence in the list also defines the sequence of forwarding attempts.

The network operator sets the maximum possible call time for external callers (generally 90 seconds). Depending on the number of call forwarding numbers, the call time per forwarding action and the number of pause functions entered, it may not be possible to completely process a forwarding destination list before the network operator clears down the call.

Select **Settings - Forwarding destination lists** to define/edit forwarding destination lists. The forwarding destination lists available appear.

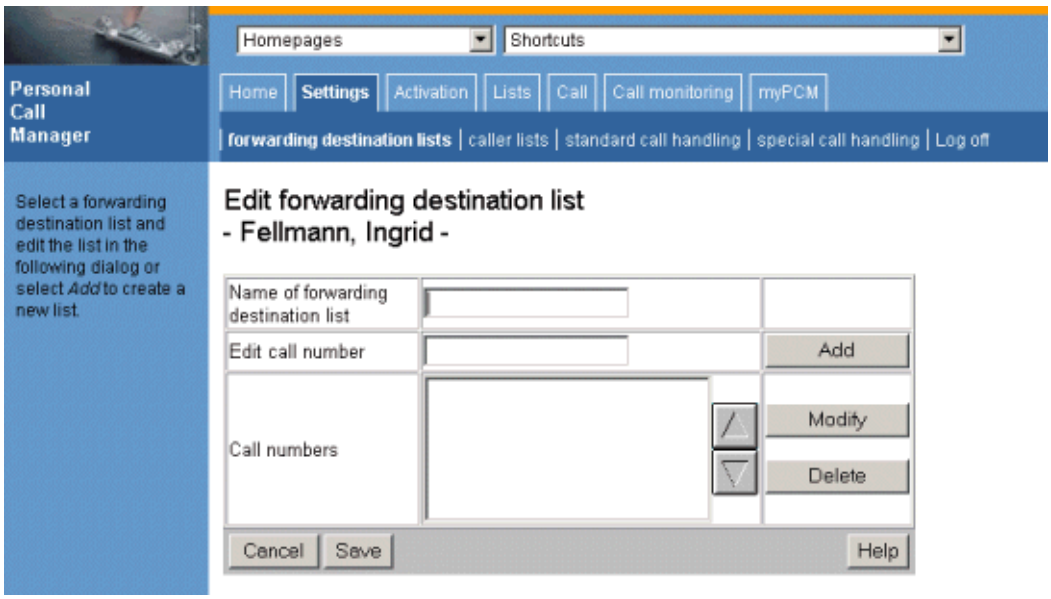
Display



Defining a new forwarding destination list

1. Select **Add**.

   ### Display



2. Enter the name of the list in the **Name of forwarding destination list** field.
3. Enter a call forwarding number in the **Edit call number** field and click **Add** or ↵ . The set of permitted characters for call numbers consists of any digit, the characters "()", "/", "-", the "P" character for the pause function (see below) and blanks. Repeat this step for every call number you want to add to this forwarding destination list. All call numbers added are displayed in the **Call numbers** list.

   At this point, you can add a pause function for call forwarding if you wish. The letter "P" stands for a time unit configured, which causes the system to pause before forwarding the next call to the number entered. This allows you to answer a call at your local telephone even if call handling has been activated. The pause character "P" is placed before the call number to delay forwarding to the subsequent call number or after the call number to extend the call time for this call number. The pause character "P" can be used more than once. This repeats the time unit for a forwarding pause.
4. To modify the call number sequence, click the call number you want to move and then use the arrow buttons to change its position in the list.
5. You can **modify** a selected call number or **delete** it from the list.
6. To save your entire input, click **Save**. You return to the overview for your forwarding destination lists.

Editing a forwarding destination list

1. Select **Modify**. The forwarding destination list entries appear.
2. You can edit the name of the list and the contents and sequence of the entries under **Name of forwarding destination list**.
3. To save your changes to the list, click **Save.** You return to the overview for your forwarding destination lists.

Deleting a forwarding destination list

1. Select the list to be deleted from the overview and then click **Delete**. The list is deleted with all entries.

Activated forwarding destination lists cannot be deleted.

3.2.2 Caller lists

When defining call handling types, PCM can distinguish between standard and special callers. Special callers are grouped into caller lists which are then assigned to the relevant call handling types during definition.

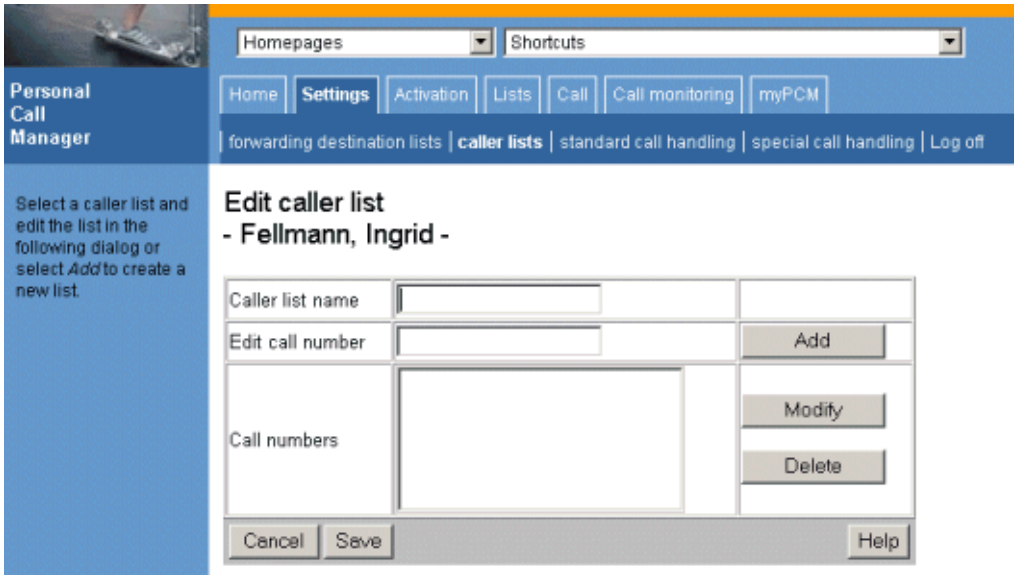
- A caller list can contain an unlimited number of caller numbers.

Select **Settings - Caller lists** to define/edit caller lists. The caller lists available appear (like the forwarding destination lists in section 3.2.1).

Defining a new caller list

1. Select **Add**.

   Display



2. Enter the name of the list in the **Caller list name** field.
3. Enter a caller number in the **Edit call number** field and click **Add** or ↵ . Repeat this step for every call number you want to add to this caller list. All call numbers added are displayed in the **Call numbers** list.
4. You can **modify** a selected call number or **delete** it from the list.
5. To save your entire input, click **Save**. You return to the overview for your caller lists.

Editing a caller list

1. Select **Modify**. The caller list entries appear.
2. You can edit the name of the list and the contents and sequence of the entries under **Caller list name**.
3. To save your changes to the list, click **Save.** You return to the overview for your caller lists.

Deleting a caller list

1. Select the list to be deleted from the overview and then click **Delete**. The list is deleted with all entries.

Caller lists which were assigned a special call handling type cannot be deleted.

3.2.3 Standard/special call handling

When defining call handling types, key data is configured for the relevant call handling type and forwarding destination lists are assigned in the form of forwarding destination lists. PCM can also distinguish between call handling for standard calls, i.e. calls that are not specified in greater detail, and for special calls.

3.2.3.1 Standard call handling

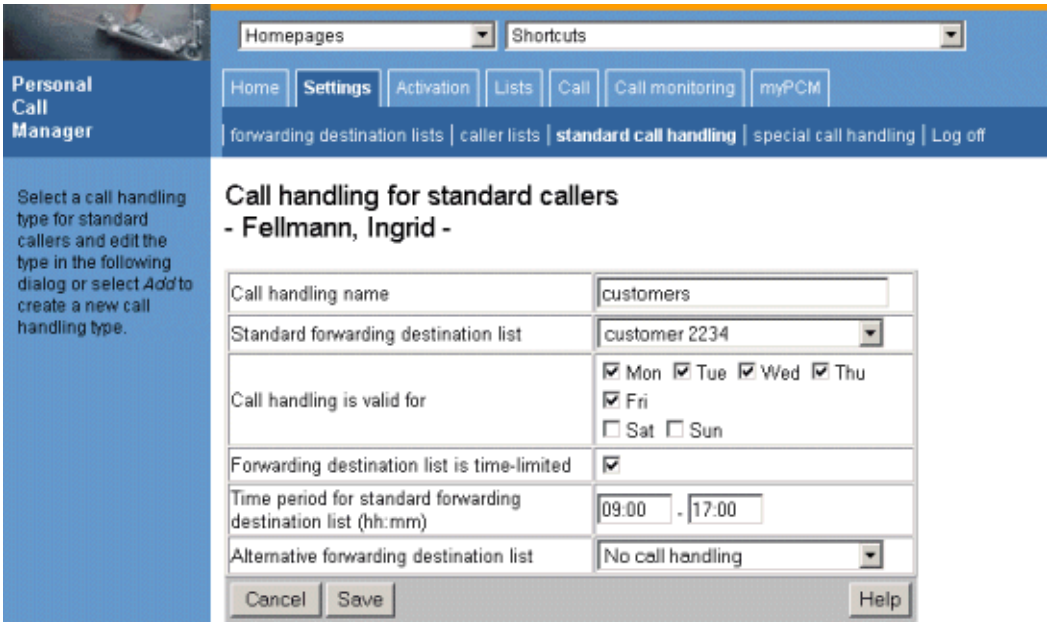
1. Select **Settings - standard call handling** to configure call handling for standard callers.

   A list of the call handling types you defined for standard callers appears (like the forwarding destination lists in section 3.2.1).

Defining a new call handling type for standard callers

1. Select **Add**.

Display



2. Enter the following data:

Field	Description
Call handling name	Name of the call handling type for special callers
Standard forwarding destination list	Select a forwarding destination list for call handling. A list must be selected, otherwise the call handling type cannot be saved.
Call handling is valid for	This is where you select the days of the week on which the call handling feature is to apply (independent of the time-limited option specified below; selected = applies on the corresponding days).
Forwarding destination list is time-limited	This option specifies whether or not call handling is time-limited: – Option is marked: Call handling type applies for the specified time period – Option is not marked: Call handling type applies until the call handling types set in PCM are deactivated.

Field	Description
Time period for standard forwarding destination list (hh:mm)	This is where you specify the period for which the time-dependent standard profile is to apply. Entries must have the format hh:mm and correspond to the local time zone. The time periods entered are not compared with each other, i.e. the period 22:00 - 02:00 can be defined and activates the standard profile for midnight; the times entered are stored in GMT time format by location in the database.
Alternative forwarding destination list	Select a forwarding destination list that should apply outside the configured time in the case of time-specific call handling. A forwarding destination list does not have to be selected.

If you activated time-dependent call handling without selecting an alternative forwarding destination list, call handling is **not** performed outside the times specified for the standard forwarding destination list.

3. To save your entire input, click **Save**. You return to the overview for your call handling type for standard callers.

Editing a call handling type for standard callers

1. Select the call handling type followed by **Edit**. The call handling entries appear. Proceed in the conventional manner to modify the entries.
2. To save your changes to the list, click **Save.** You return to the overview for your call handling type for standard callers.

Deleting a call handling type for standard callers

1. Select the call handling type to be deleted from the overview and then click **Delete**. The call handling type is deleted.

3.2.3.2 Special call handling

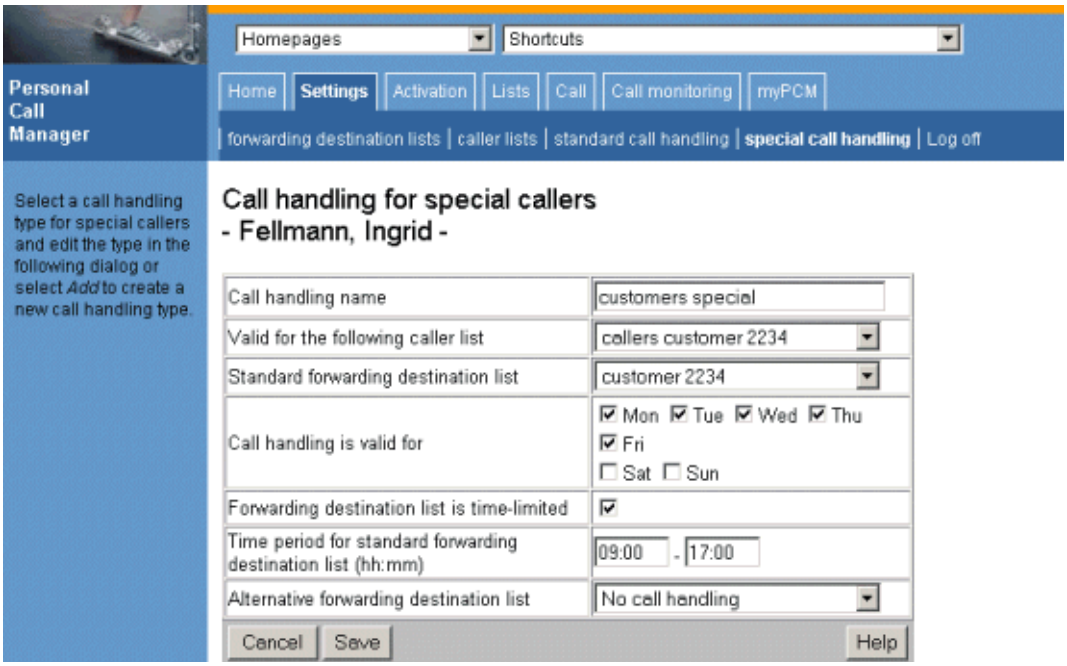
1. Select the **Settings - special call handling** to configure call handling for special callers.

   A list of the call handling types you defined for special callers appears.

Defining a new call handling type for special callers

1. Select **Add**.

Display



2. Enter the following data:

Field	Description
Call handling name	Name of the call handling type for special callers
Valid for the following caller list	Select the relevant caller type for this handling type. A list must be selected, otherwise the handling type cannot be saved.
Standard forwarding destination list	Select a forwarding destination list for call handling. A list must be selected, otherwise the call handling type cannot be saved.
Call handling is valid for	This is where you select the days of the week on which the call handling feature is to apply (independent of the time-limited option specified below; selected = applies on the corresponding days).
Forwarding destination list is time-limited	This option specifies whether or not call handling is time-limited: – Option is marked: Call handling type applies for the specified time period – Option is not marked: Call handling type applies until the call handling types set in PCM are deactivated.

Field	Description
Time period for standard forwarding destination list (hh:mm)	This is where you specify the period for which the time-dependent standard profile is to apply. Entries must have the format hh:mm and correspond to the local time zone. The time periods entered are not compared with each other, i.e. the period 22:00 - 02:00 can be defined and activates the standard profile for midnight;
Alternative forwarding destination list	Select a forwarding destination list that should apply outside the configured time in the case of time-specific call handling. A forwarding destination list does not have to be selected.

If you activated time-dependent call handling without selecting an alternative forwarding destination list, call handling is **not** performed outside the times specified for the standard forwarding destination list.

3. To save your entire input, click **Save**. You return to the overview for your call handling type for special callers.

Editing a call handling type for special callers

1. Select the call handling type followed by **Edit**. The call handling entries appear. Proceed in the conventional manner to modify the entries.
2. To save your changes to the list, click **Save.** You return to the overview for your call handling type for special callers.

Deleting a call handling type for special callers

1. Select the call handling type to be deleted from the overview and then click **Delete**. The call handling type is deleted.

3.3 Activation

Call forwarding is only performed for a user/his or her call number in PCM if

- the necessary configuration data, such as forwarding destination lists, caller lists, etc., were entered
- and the call handling types were activated in PCM.

A distinction is made between the following call handling types:

- Call handling for standard callers
- Call handling for special callers
- Standard handling for standard callers
- Standard handling for special callers

Standard handling

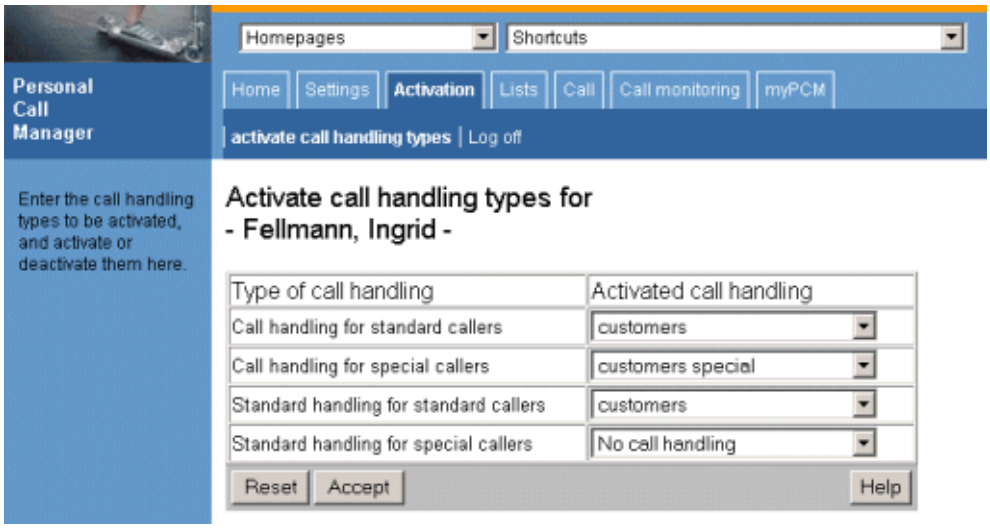
The standard handling types are activated/deactivated via a (programmable) terminal key.

3.3.1 Activate call handling types

1. Select **Activation - activate call handling types** to activate configured call handling types.

   A list of call handling types appears with the relevant activation status.

   Display



2. To activate a (standard) call handling type for standard/special callers, select a configured call handling type from the list boxes.
3. Then click **Accept**. This saves any changes or activations to the database which are then implemented online by Service. The **Reset** button allows you to restore the previous settings.

The activated call handling types are displayed under **Home - display activated call handling types**.

Only one call handling feature at a time may be activated. When a call handling feature is activated, the configured text appears on your telephone display (if you have one, see also section 3.7.1, "My settings").

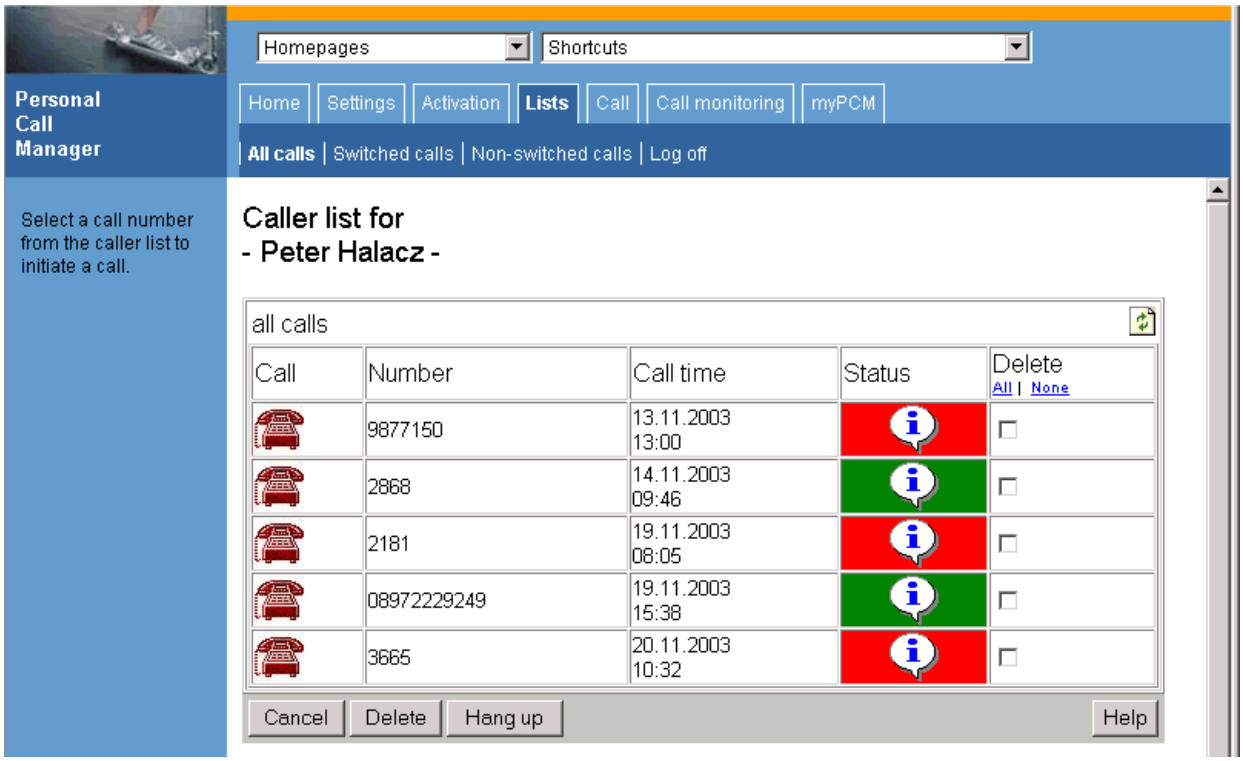
3.4 Lists

All incoming calls in PCM are saved in caller lists. Beside general call information, such as call number, the forwarding status is also stored. The following lists are output:

- List of all calls (switched and non-switched calls)
- List of switched calls
- List of non-switched calls

The call list are created for every PCM subscriber irrespective of the activation status.

Display (example: list of all calls)



The list contains the following information/functions:

Column	Description
Call	Click the Call icon to initiate a callback (via your telephone) to the internal or external caller saved.
Number	Caller's call number. When call number suppression is active, the **Number** and **Name** fields remain blank; this subscriber cannot be called back. In this case the Call icon is missing from the **Call** column.
Call time	Time of the last call from this subscriber.

Column	Description
Status	Forwarding status, where: • red means call was not positively forwarded (PCM was not active for the call or the call could not be successfully forwarded). • green xxx means call was positively forwarded. Clicking the Status icon provides additional information on the call and whether or not it was connected.
Delete	Delete flag for this call in the list. The functions **All** (select all list entries) and **None** (select no list entries) in the column heading help you when selecting entries for deletion. When you click **Delete**, all marked entries are deleted from the list.

- Use the icon to refresh the caller list.
- Click **Cancel** to close the caller list.
- Click **Hang up** to terminate a live connection (this function depends on the terminal used, see also section 3.7.1, "Differences and restrictions for terminal types").
- Click **Delete** to delete one or more selected list entries.

Status examples

Call status

Date	19.11.2003
Time	15:38
Caller's number	08972229249
Connection state	Caller was connected
Was connected to	2087
Connect time	1 Second (s)

Close

Switched call

Call status

Date	13.11.2003
Time	13:00
Caller's number	9877150
Connection state	No call acceptance, caller hung up while call was being forwarded
Was connected to	
Connect time	

Close

Non-switched call

Status overview

A distinction is made between the following call/switching/forwarding statuses:

- Call status switched (green):
  - Call was positively forwarded
- Call status non-switched (red):
  - No call acceptance, cleared down after call time
  - PCM was not active
  - Forwarding error
  - No call acceptance, canceled after forwarding to last destination
  - No call acceptance, not canceled after forwarding to last destination
  - No suitable call handling type (call, time)
  - Call was picked up by a PABX or another application
  - Last forwarding destination was busy
  - PCM is currently forwarding another call
  - No call acceptance, caller hangs up while call was being forwarded

3.5 Call

You can initiate calls with other subscribers via the PCM's web interface. In this case, your terminal operates as a deputy:

1. You forward the call.
2. Your telephone rings.
3. You lift the handset.
4. The call is then set up (call setup).

The following options are available in PCM for calling subscribers:

- Direct dialing
- Dialing from the telephone directory
- Dialing from the caller list

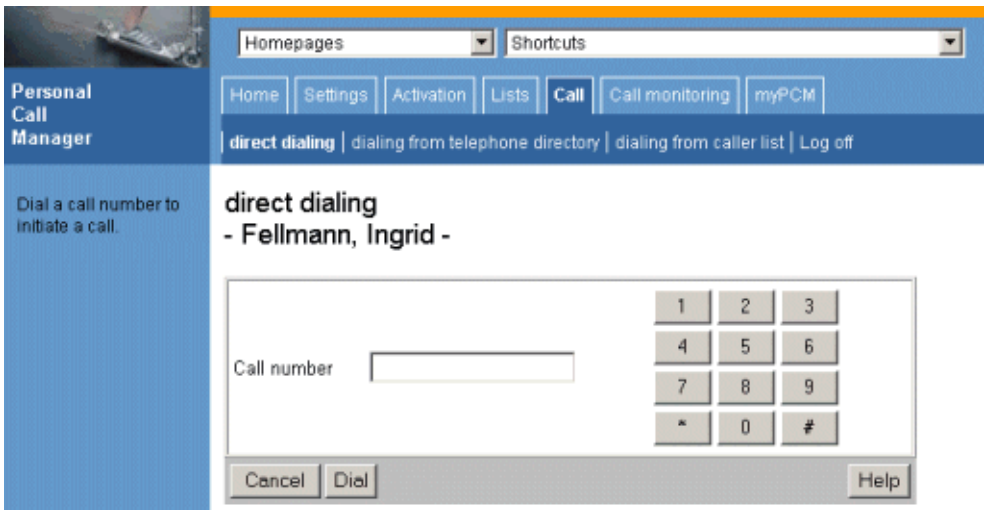
3.5.1 Direct dialing

In the case of direct dialing, you enter the subscriber's complete call number - in the same way as when dialing from a terminal.

1. Select **Call - direct dialing** to initiate direct dialing.

   The dialog for direct dialing appears.

   Display



2. Enter the subscriber's call number in full by clicking the digits or via the PC keyboard.

3. Then click **Dial** or confirm with ↵ . Your telephone rings, you lift the handset and the call is set up.

3.5.2 Dialing from the telephone directory

Information for accessing a central telephone directory (LDAP) can be entered for the user in PCM. Subscribers in this telephone directory can be found via PCM.

When dialing from the telephone directory, you first search the PCM to find the relevant subscriber and then set up the call using the search result.

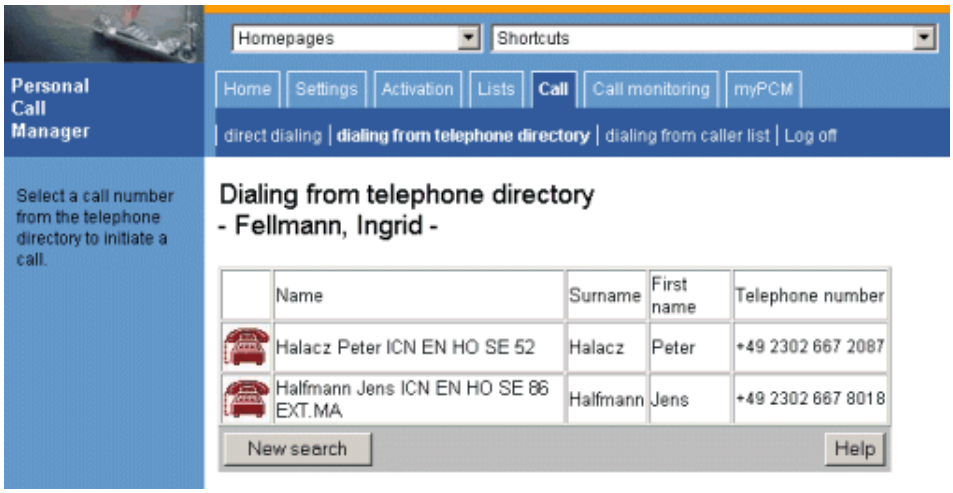
1. Start the function by selecting **Call - dialing from telephone directory**.

   The subscriber search dialog appears.

   Display

2. Enter the subscriber's name or part of the name, (first name/part of first name optional), without wildcards/meta characters in the **Name** field.
3. Click **Search**. The telephone directory is searched.
4. A hit list appears containing all subscribers with matching name and call number (as stored in the telephone directory).

Display



5. Then click the telephone icon in the first column to select the subscriber. Your terminal rings, you lift the handset and the call is set up.
6. If the search was not successful or the result too extensive, an error message is displayed in the table instead of the result entries. You can return to the search dialog with **New search** to start a new search in the telephone directory.

Numbers can only be dialed from the telephone directory if an LDAP connection is configured for the users in the user-specific parameters (see also section 3.7.1, "My settings") and this connection can basically be set up via the relevant network mechanisms and rights.

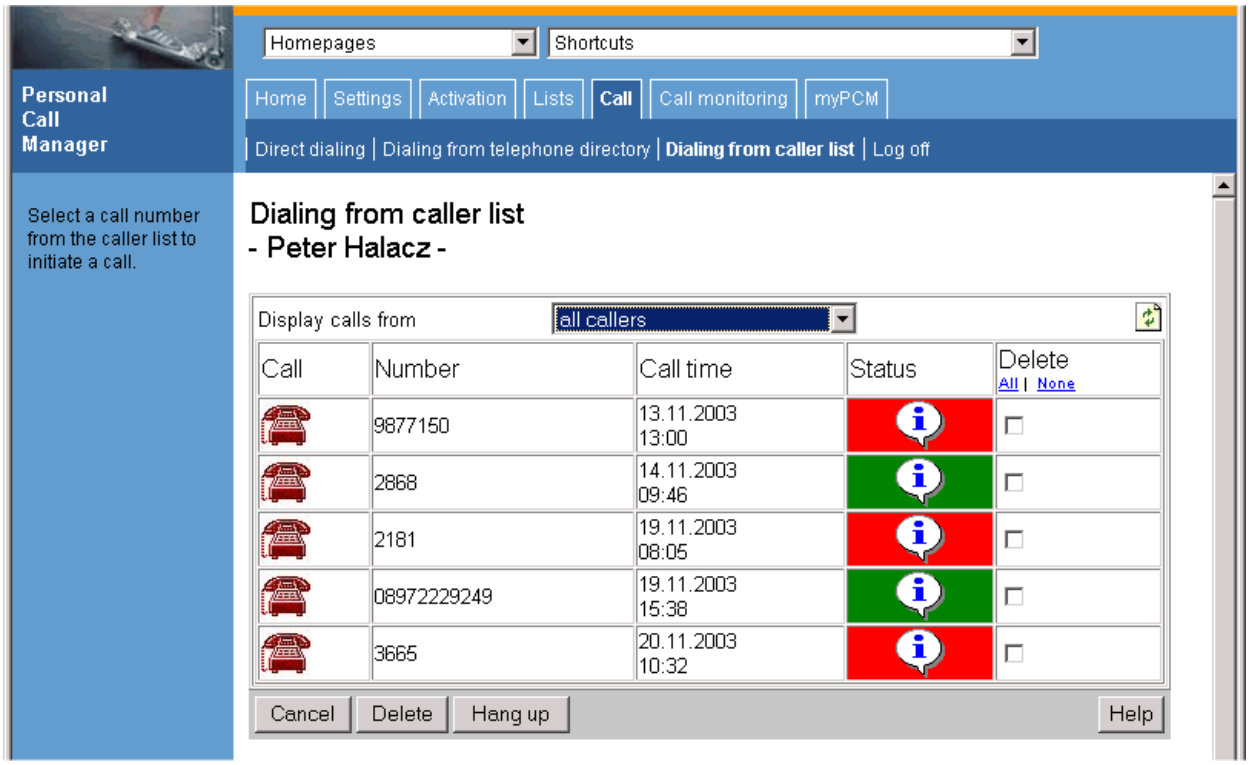
3.5.3 Dialing from the caller list

Calls are saved in caller lists in PCM. The callers can be called up from this caller list in PCM.

1. Start the function by selecting **Call - dialing from caller list**.

   A caller list appears.

   Display



2. Select the caller list you want in the **Display calls from** field. The following options are available:
   - all callers
   - switched callers
   - non-switched callers
3. Then click the telephone icon in the first column to select the subscriber. Your terminal rings, you lift the handset and the call is set up.

You can also obtain details about the caller's forwarding status, delete entries from the caller list or clear down a live connection. The procedure is described in section 3.2.2, "Caller lists".

3.6 Call monitoring

You can monitor your own terminals for incoming calls in PCM. Caller information is displayed as soon as a call is received. You can then accept the call or forward it using one of the options available.

Automatic signaling

1. Select **Call monitoring - automatic signaling** to activate call monitoring with automatic signaling. PCM now waits for calls.

   Caller information available is displayed as soon as a call is received.

   Display

2. You now have the following options:

   – Accept the call
   Click **OK** in the **Accept call** line. The call is accepted at your telephone and the loudspeaker is activated. Whether or not this option is available depends on the terminal used (see also section 3.7.1, "Differences and restrictions for terminal types").

   – Forward the call to a specific call number
   Enter the destination call number in the **Forward call to this number** field and click **OK** in the same line. The call is forwarded to the call number you want.

   – Forward the call to a forwarding destination list
   Select the relevant list in the **Forward call to the forwarding destination list** and click **OK** in the same line. The call is forwarded to the call number(s) as configured in the selected list.

You can activate automatic signaling for call monitoring or else activate general PCM call handling (see section 3.3.1, "Activate call handling types") for a user. Consequently, all activated call handling types are deactivated when online caller monitoring is activated.
Call handling types are not automatically re-activated when online caller monitoring is terminated.

If neither the origin nor the call number of a caller is known, only the **Accept call** function is available.

3.7 myPCM

Each user can make individual settings in the PCM that are linked to PCM processing. These settings include:

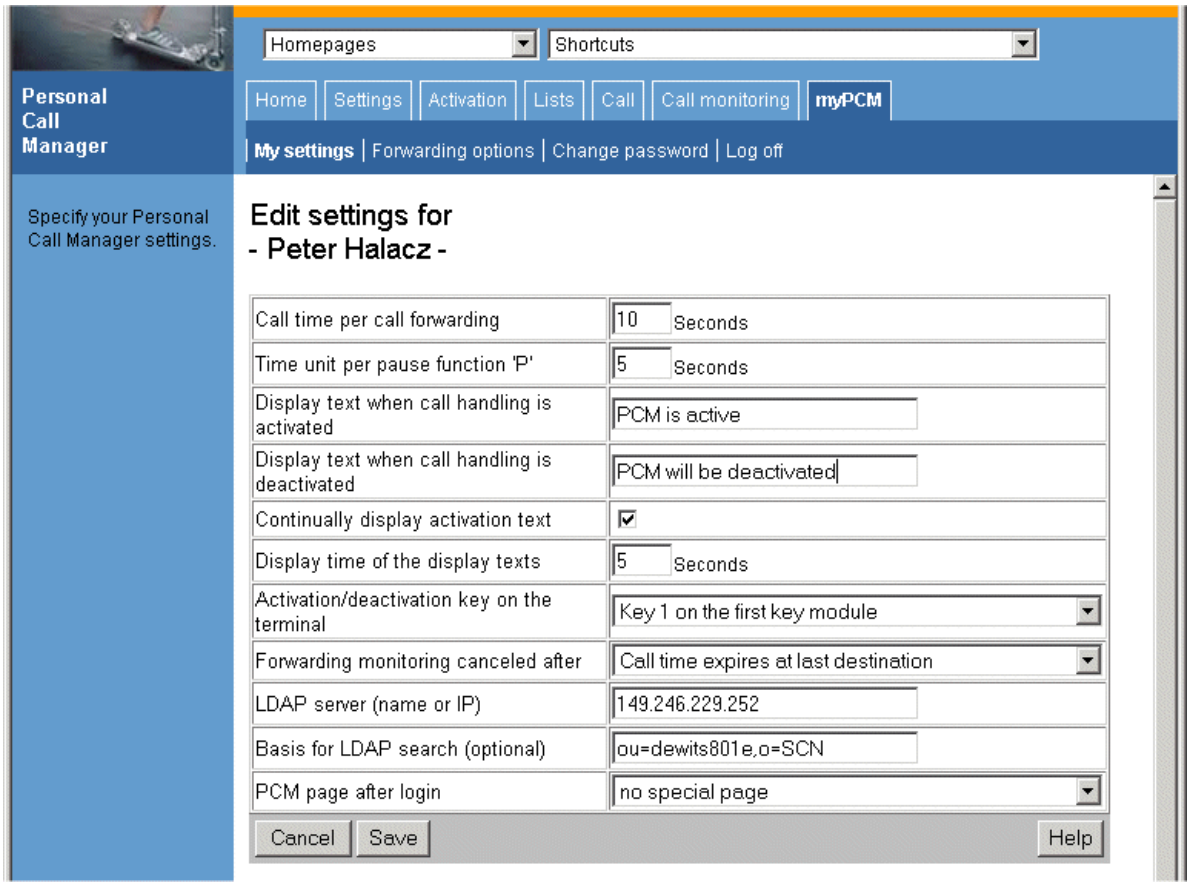
- My settings
  General settings, for example, about times and texts, the telephone directory or terminal keys
- Forwarding options

3.7.1 My settings

1. Select **myPCM - my settings** to set the user-specific settings for the PCM.

   The dialog for setting user-specific settings appears.

Display



You can make the following settings:

Field	Description
Call time per call forwarding	Call time in seconds at a call destination before PCM forwards the call to the next destination.
Time unit per pause function 'P'	Pause time in seconds for call forwarding actions, to facilitate call acceptance despite the call handling type set or specific call management modification. The pause function is entered where necessary in the forwarding destination lists (see also section 3.2.1, "Forwarding destination lists").
Display text when call handling is activated	Display text that should appear at the telephone when call handling is active. • If the **Continually display activation text** option is not activated, this text is displayed after call handling activation for the duration specified under **Display time of the display texts**. • If the **Continually display activation text** option is activated, this text is permanently displayed after call handling activation until the call handling activity is disabled.
Display text when call handling is deactivated	Display text that should appear at the telephone when call handling is active. • This text appears after deactivating the call handling type and remains visible for the duration of the deactivation.
Continually display activation text	Activate this option if you want the telephone to display the text permanently during activation.
Display time of the display texts	Duration of the text display on the terminal (in seconds) after activating the call handling type.

Field	Description
Activation/deactivation key on the terminal	Select the terminal key to activate (LED on)/deactivate (LED off) standard call handling in PCM. The terminal keys available here depend on the type of terminal configured by the system administrator for the extension. `No key` is entered here by default. **Overview of terminal types/keys available** optiset E basic, optiPoint 500 entry • Key 5-8 on the terminal optiset E standard • Key 5-12 on the terminal optiset E comfort & memory, optiPoint 500 basic & standard • Key 5-12 on the terminal • Key 1-16 in the 1st key module • Key 1-16 in the 2nd key module optiPoint 600 advanced, optiPoint 600 office • Key 5-19 on the terminal • Key 1-16 in the 1st key module • Key 1-16 in the 2nd key module other terminals • No key possible
Forwarding monitoring canceled after	Define the condition for canceling forwarding monitoring for calls. The following options are available: • Call time expires at last destination • Forwarding to last destination • Call acceptance or hang up The PCM can only forward one call at a time. Other calls remain at the terminal until the previous forwarding monitoring operation is complete.
LDAP server (name or IP)	Name of the LDAP server's IP address (telephone directory server).
LDAP base of search (optional)	Specifies a particular base where the search for entries should start in the LDAP folder. The display can be made in either of two formats: • *<Level 3>=<Name>, <Level 2>=<Name>, <Level 1>=<Name>* • or *<Level 1>=<Name>/<Level 2>=<Name>/<Level 3>=<Name>* If you do not specify a restrictive search base, the entire LDAP folder will be the search base.
PCM page after login	Select a PCM function page that should appear by default after user login. All of the PCM's function pages are available.

Differences and restrictions for terminal types

– other terminals and groups

  cannot accept (but can forward) a call when Web call monitoring is active,
  cannot initiate callbacks from caller lists,
  cannot use the entire CTI dial functionality (disabled),
  cannot configure a PCM key.

– analog terminals

  cannot accept (but can forward) a call when Web call monitoring is active,
  can initiate callbacks from caller lists but cannot clear down the call,
  can use the entire CTI dial functionality but cannot clear down the call (disabled).

– IP terminals and softphones (clients)

  cannot configure a PCM key

– all other terminal types

  have the exact same functionalities as the physical terminal (for example, number of keys)

2. Then click **Save** to accept your settings.

Programming a PCM key on the terminal

At present, the system does not support a special key configuration that corresponds specifically to PCM. If no key features are programmed, error messages, such as "not saved", appear when keys are pressed and conflict with the PCM display messages. To prevent this, you can program features on PCM keys that are not linked to any other display outputs. In doing so, you must remember that pressing these keys activates the assigned feature, and that, depending on the current telephone status, this could also have negative effects.

The following features can be programmed on keys:

- Level switching. Disadvantage: the active level changes depending on whether PCM is activated or deactivated; all levels should therefore be programmed identically; level switching/operation can no longer be used for other features.
- Fax/answering machine information. Disadvantage: when using a mailbox, pressing this key generates a call to the mailbox; can only be used for PCM if no mailboxes are used.
- Idle, but with displays "Idle on" and "Idle off". Can be used to activate/deactivate idle together with the PCM, but only when activation/deactivation is performed via the terminal and not in the meantime via the Web – which could lead to inconsistencies, e.g. the PCM is deactivated via the Web, but idle status remains active -> the next time the key is pressed, PCM is activated and idle status is deactivated.
- Disconnect key. Disadvantage: may only be used in call-free status to activate/deactivate PCM, otherwise the currently active call is cleared down.
- Error function: [same as Disconnect, only this involves a dialing error and offers a redial option]. Disadvantage: may only be used in non-acceptance status to activate/deactivate PCM, otherwise the number currently dialed is cleared down.
- Pickup group. Disadvantage: can only be used if the station is not a member of a PU group and thus inadvertently answers an incoming PU call by pressing the key.

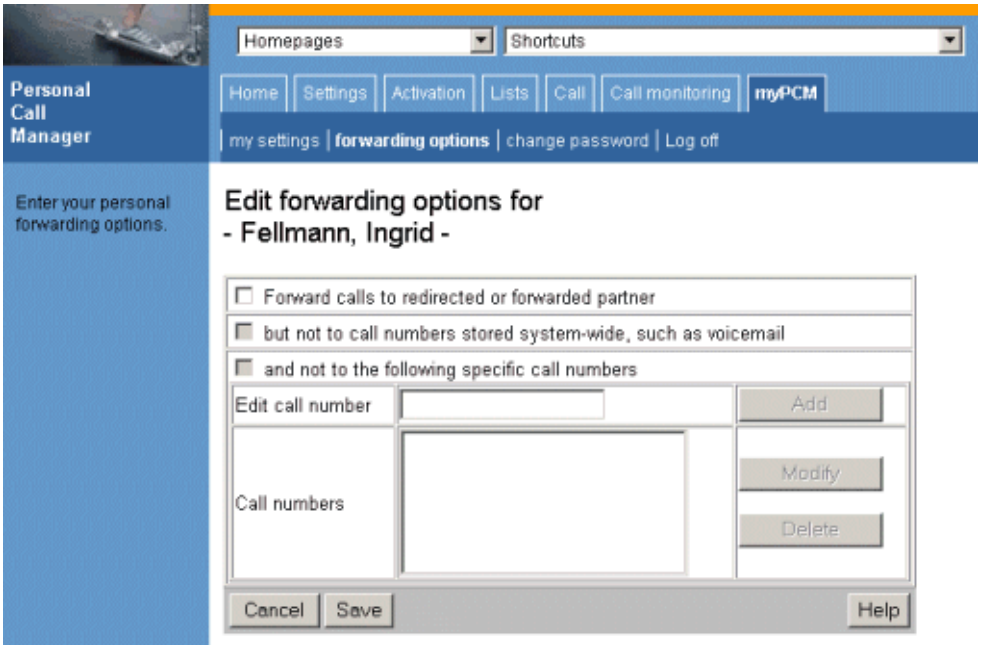
Depending on the features used, this or any feature configuration can be implemented to use the PCM activation/deactivation key. We recommend, however, the use of the error function, because on the one hand a PCM is not activated/deactivated during call acceptance and on the other hand, the fewest number of disadvantages are to be expected with these functions.

3.7.2 Forwarding options

Every user can set different forwarding options.

1. Select **myPCM - forwarding options** to set the user-specific forwarding options.

   Display



2. Select **Forward calls to redirected or forwarded partner** if calls are to be forwarded to stations for which call redirection or forwarding is active. This facilitates chained call forwarding.

3. If the system supports call forwarding to forwarded stations, you can prevent forwarding to voicemail call numbers, hunt group call numbers, ACD groups, etc. by activating **but not to call numbers stored system-wide, such as voicemail**. The call numbers saved system-wide are defined by the system administrator.

   If the system supports call forwarding to forwarded stations, you can define call forwarding numbers which should be ignored by such a forwarding action.

   In the case of forwarded stations, only the first forwarding destination of the activated call handling type is considered.

   To define the call numbers to which calls should not be forwarded, activate the option **and not to the following specific call numbers**. Enter the caller number you want in the **Edit call number** field and select **Add**. Repeat this procedure for each of the call numbers.

The numbers are displayed in the Call number list and, following selection, can be edited by clicking **Modify** or removed from the list with **Delete**.

4. Then click **Save** to accept your settings.

Example 1:
Chained forwarding to unwanted system-wide call numbers:

- Forward calls to redirected or forwarded stations.
- One of these subscribers configured redirection/forwarding to his/her personal voicemail. However, you do not support this type of forwarding:

1. Select **but not to call numbers stored system-wide, such as voicemail**.

Example 2:
Chained forwarding to unwanted individual call numbers:

- Forward calls from your customers to a colleague in your department.
- This colleague configured redirection/forwarding to another colleague in an unconnected department. However, you do not support this type of forwarding:

1. Select **and not to the following specific call numbers** and enter all "unconnected department" call numbers in the Call numbers list.

In the case of chained call forwarding, only the last destination in the forwarding chain is considered before the call is forwarded to the next call number in your list.
Example:
- Your forwarding list contains the call numbers 150 and 160.
- 150 forwarded to 151.
- 151 forwarded to 152.
- 152 forwarded to 153.

An incoming call would be forwarded from 153 to 160.

In the case of call forwarding, the first destination in the "third" forwarding destination list is only ever considered and the call is then forwarded to the next call number in your list.

Example:

- Your forwarding list contains the call numbers 150 and 160.
- PCM-based forwarding is programmed for 150 with the forwarding destination list 151 and 152.

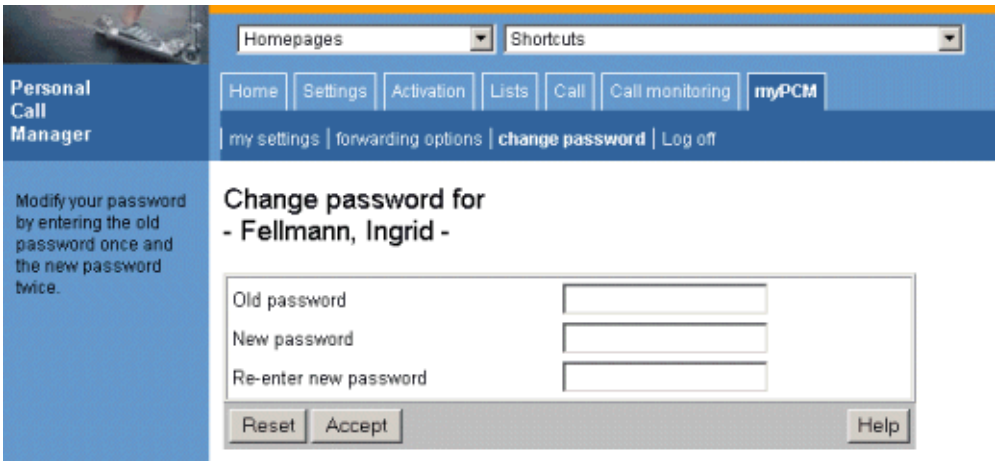
An incoming call would be forwarded via 151 (instead of 150) to 160. In the case of chained call forwarding, only the last destination in the chain list is considered.
If PCM-based forwarding is programmed with the destinations 155 and 156 for the call number 151 in this example, a call is forwarded via 155 (instead of 150 -> 151) to 160

3.7.3 Change password

You can change your own PCM password any time you wish. For security reasons and to avoid typing errors, you will be requested to enter your new password a second time.

1. Select **myPCM - change password**.

   Display



2. Enter your existing password in the **Old password** field.
3. Enter your new password in the two remaining fields and confirm by clicking **Accept** or pressing ↵ .

   The new password is then saved in the system. It must be used the next time you log on. The **Reset** function clears all entries from the screen and positions the cursor in the first field.

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